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ABSTRACT

This booklet, which is intended for human resource managers, provides practical guidance regarding preparing for an aging work force. Chapter 1 concerns the relationship between business practices and age neutrality and offers checklists that human resource managers can use to assess their company's general policy development, training, recruitment, and job redesign. Chapter 2, which focuses on hiring midcareer and older workers, discusses the following topics: supply and demand and the shortage of needed skills; the characteristics of midcareer and older workers, potential barriers to hiring them, and recruiting methods; and marketing (Senior Employment Network, Senior Community Service Employment Programs, Work Force Investment Act, America's Job Bank, America's Talent Bank, Forty Plus, National Clearinghouse on State and Local Older Worker Programs). The following aspects of training midcareer and older workers are examined in chapter 3: (1) training (career burnout, plateauing, and obsolescence); (2) career management; and (3) determining training needs (identification, motivation, building self-confidence, setting goals and objectives, and adapting training techniques). Chapter 4 explains the following principles of motivating midcareer and older workers: (1) use needs as motivators; (2) link satisfying needs to behavior; (3) set specific, challenging, yet attainable goals; (4) provide means to achieve goals; (5) reward achievement; (6) maintain motivation; and (7) create alternative arrangements. (MN)

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A PRACTICAL GUIDE FOR EMPLOYERS

work force

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AARP

preparing for an aging work force

A Practical GUIDE for Employers

INTRODUCTION 3

CHAPTER ONE: Business Employment Practices and Age-Neutrality 5

- General Policy Development Checklist
- Training Checklist
- Recruiting Checklist
- Job Redesign Checklist

CHAPTER TWO: Hiring Midcareer and Older Workers 7

- Supply and Demand and the Shortage of Needed Skills
- Midcareer and Older Workers: A Profile
  - Midcareer Workers
  - Older Workers
  - Potential Hiring Barriers
  - Recruiting
- Marketing
  - The Senior Employment Network
  - Senior Community Service Employment Programs
  - Work Force Investment Act
  - America's Job Bank
  - America's Talent Bank
  - Forty Plus
  - National Clearinghouse on State and Local Older Worker Programs (NCSLOWP)

CHAPTER THREE: Training Midcareer and Older Workers 11

- Training
  - Career Burnout
  - Career Plateauing
  - Career Obsolescence
- Career Management
- Determining Your Training Needs
  - Identification
  - Motivation
  - Building Self-Confidence
  - Setting Goals and Objectives
  - Adapting Training Techniques

CHAPTER FOUR: Motivating Midcareer and Older Workers 17

- Principle 1: Use Needs as Motivators
- Principle 2: Link Satisfying Needs to Behavior
- Principle 3: Set Specific, Challenging, Yet Attainable Goals
- Principal 4: Provide Means to Achieve Goals
- Principle 5: Reward Achievement
- Principle 6: Maintaining Motivation
- Creating Alternative Arrangements

CONCLUSION 20

ABOUT AARP 20

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INTRODUCTION

American businesses are facing tough decisions. They have to compete against companies not just in the same state or nation, but all over the world. Fierce competition demands ever-higher levels of employee productivity and creativity.

You've tried teams, strategic work groups, and total quality management. You've restructured, downsized, and reorganized. You've acquired, merged, and divested. Your company is poised for the millennium, but one problem remains: Where are you going to find qualified people to do the work? It's a question that is keeping executives awake at night.

As of the year 2000...

- The U.S. economy will have generated 21 million new jobs from the mid-1990s. Most will be in the services sector, and many will demand higher levels of skill than ever before in math, language, and reasoning ability.
- There will be shortages of qualified workers for service jobs traditionally filled by younger workers. Employers will have to look to new sources of workers, including midcareer and older workers.
- Workers aged 55 to 64 will be the fastest-growing segment of the labor force. Meanwhile, there will be significantly fewer potential workers between the ages of 16 and 24, and many of them will lack basic job readiness.

These are just some of the reasons many human resource managers are already reassessing the potential contributions of midcareer and older workers as they set their staffing plans.

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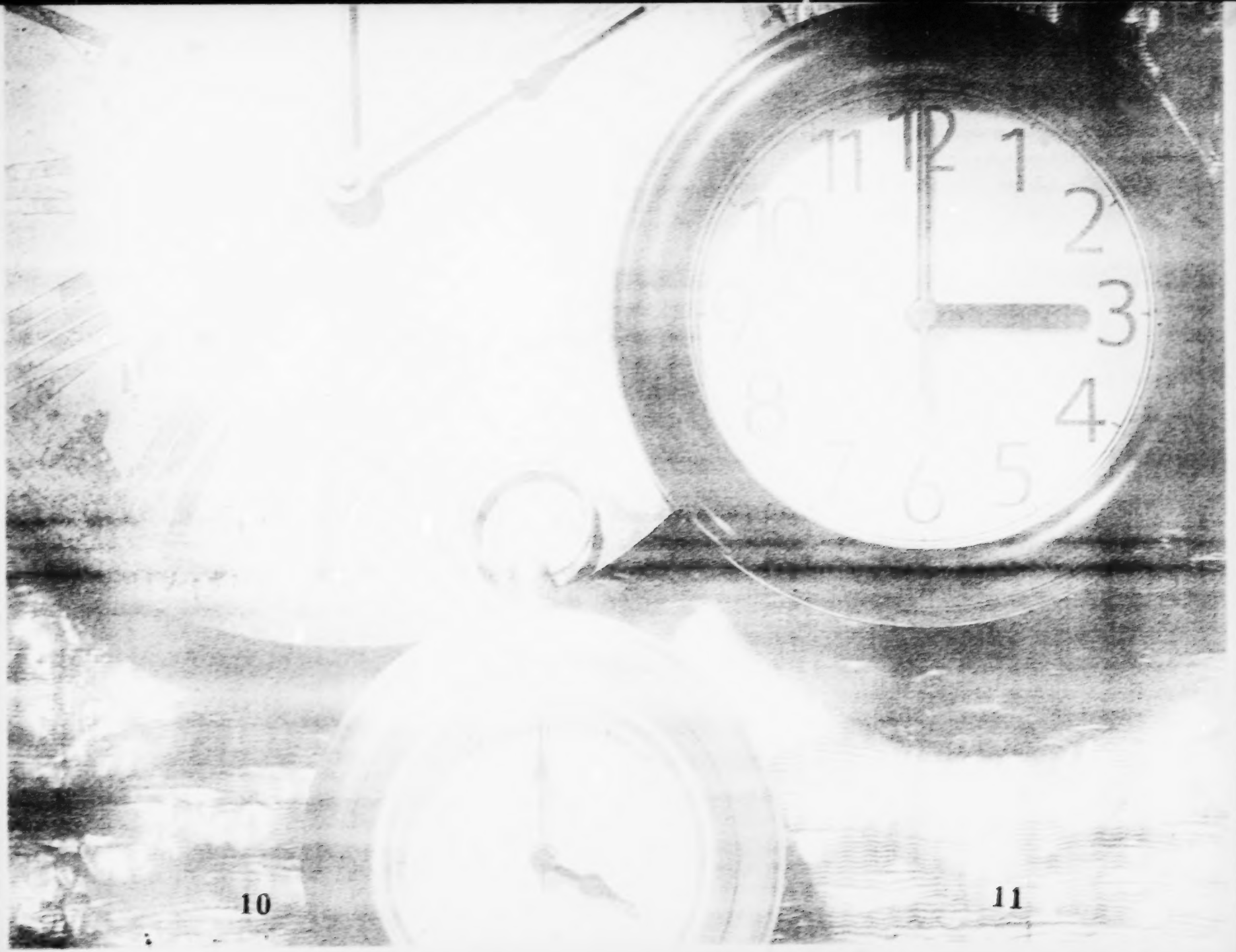

chapter 1

BUSINESS EMPLOYMENT PRACTICES AND AGE NEUTRALITY

Many employers are interested in learning how they can make their jobs more attractive to good workers, including midcareer and older workers. They want to know what they can do to improve their recruiting efforts, their management style, and their training policies to attract and keep valuable employees.

In auditing your business employment practices for age neutrality, the following checklists can help you assess your company's practices and policies. Not every employer can implement every suggestion. However, many of the suggestions may help you build an age-neutral quality work force that includes the experience of mature persons.

General Policy Development Checklist Do you...

1. Use focus groups of retirees and persons aged 40-49, 50-64, and 65-plus to determine:
   - Midcareer and older persons' perceptions of your organization?
   - What they want in a job?
   - How to market jobs to them?
2. Include midcareer and older managers and workers, retirees, and members of the local senior employment network on advisory committees and other policymaking committees?
3. Use these advisory committees to help you assess their perceptions of your employment package and recruitment strategies?
4. Regularly examine your organization's policies and practices in recruitment, hiring, evaluation, training, promotion, and termination to check for age discrimination or negative stereotyping?
5. Know what the attitudes of your supervisors and other workers are toward midcareer and older workers?

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6. Equate volunteer work experience with paid work experience when considering a candidate for a job or promotion?
7. Periodically conduct age audits to examine your company's age profile and to pinpoint possible barriers to employing and promoting mature workers?
8. Have an effective, age-neutral performance appraisal system?
9. Offer a flexible benefits program that appeals equally to employees and job candidates of all ages?

Training Checklist Do you...

1. Have an age-neutral tuition assistance program for employees?
2. Evaluate the effectiveness of training programs for midcareer and older workers and, if necessary, modify programs to meet their skill needs and incorporate their past experiences?
3. Encourage all employees to participate in informal training and development, including job rotation, internship programs, and on-the-job coaching?
4. Sensitize managers and all workers to age stereotyping and show them how stereotyping can lead to unfair treatment of mature workers?
5. Set goals with managers that include equitable training and development and full use of midcareer and older employees? Reward managers for meeting those goals?
6. Educate managers about age discrimination laws?
7. Relate new techniques and practices to the older trainees' past experiences and encourage them to use their past experiences in new situations?

Recruiting Checklist Do you...

1. Periodically review your recruiting process to be sure that it is positive and does not intimidate or frustrate job candidates?
2. State in job advertisements that your organization seeks employees with maturity, good judgment, and experience, even for entry-level jobs?
3. Try to meet the special needs of older candidates, such as providing training that takes their experience into account?
4. Sensitize all managers to the value of hiring and promoting mature workers?
5. Offer a benefits package for part-time workers that is fair and equitable?
6. Offer information to older candidates on the effect their employment might have on any Social Security and pension benefits?
7. Consider rehiring your own retirees or those of your competitors for part-time and full-time jobs?
8. Maintain a job bank that includes retired workers who might be interested in filling temporary positions?
9. Tap into agencies and networks that involve the midcareer and older population you want to recruit? These include:
   - Volunteer groups;
   - Social service and employment agencies for special populations;
   - Service, civic, and religious organizations; and
   - Education and training centers.
10. Use posters, fliers, and the media to target midcareer and older workers?
11. Participate in local job fairs?
12. Train your interviewers to be sensitive to the concerns of midcareer and older applicants?
13. Recognize that older workers may have a legitimate reason for accepting less than they earned in the past and aren't necessarily job-hopping.

Job Redesign Checklist Do you...

1. Identify jobs that can be done by workers with physical limitations and make adjustments in certain jobs to accommodate those limitations?
2. Ask groups serving older persons and people with disabilities to help you assess and redesign jobs?
3. Redesign jobs to provide alternatives to traditional full-time work, such as:
   - Part-time
   - Temporary
   - Consulting
   - Job-sharing
   - Flex-time
   - Flex-place programs
   - Telecommuting
   - Phased retirement
4. Aggressively seek to retain midcareer and older workers through such means as mentoring programs and sabbaticals?

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chapter 2

MIDCAREER AND OLDER WORKERS

Supply and Demand and the Shortage of Needed Skills

The relentless laws of supply and demand and the growing shortage of needed skills make the need for employers to do a better job of recruiting, managing, and keeping workers who possess the requisite skills clearer with each passing day. Companies that have previously relied mostly on young, white men will see major changes as the labor force becomes more heavily female and minority in its makeup. Equally important, the median age of the nation's work force will continue to increase dramatically along with the aging of the overall population, with implications for employers and employees alike. [1]

Over most of the past half century, the number of employed middle-aged and older persons has been falling because of the availability of reliable sources of retirement income–primarily defined-benefit pension plans and Social Security, augmented by private savings and often substantial home equity. Additionally, many employer pension plans encourage earlier rather than later retirement, and indeed, some plans financially penalize workers who stay on the job beyond a specific age (60 or 62 in some cases).

Early retirement incentive programs further exacerbate the loss of vital human resource skills at a time when those skills are becoming scarce. Retirement incentives to deal with short-run economic downturns and restructurings are costly not only in human terms but frequently in corporate terms as well. When the economy rebounds or the restructuring is completed, employers sometimes find themselves starved for some workers with the very skills they have induced to depart, not infrequently having to rehire former workers as consultants while simultaneously making pension payments to the same individuals!

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Illogical as this process occasionally becomes at the level of the individual firm, it is utterly senseless when viewed from a societal point of view. People are living longer and are more robust until later in life than ever before, yet the trend toward earlier retirement–particularly when combined with still-common age discrimination in employment–is lengthening the span of retirement so that it frequently lasts nearly as long as the working years it follows. For pension plans, public and private, this means large and growing costs to subsidize retirees, concurrent with a large and growing shortage of requisite skills. These trends do not add up, and they are unsustainable.

Midcareer and Older Workers: A Profile

Who are these midcareer and older workers? They are a diverse group representing all ethnic and racial categories, as well as a broad range of educational and work experiences. While most midcareer workers are job changers, early retirees, and people displaced from their accustomed occupations, others (a relatively small and shrinking proportion) are new job entrants, mostly women, who have not previously worked outside the home.

Individual differences can be found within each.

MIDCAREER WORKERS

Career changers. Typically these are younger workers, as young as their thirties, who may have burned out in high-stress jobs, are looking for a complete change of occupation, or may have plateaued in their most recent job. Such workers may also be anticipating events-that economic conditions will jeopardize their job or industry in the near future. Or, increasingly common, they may find themselves geographically relocated because of a spouse's job change.

Midlife career changers have a strong need to work. They may be seeking advancement opportunities, new challenges, a chance to develop new skills, more money. Usually they want full-time work with full benefits. In particular, they need to maintain health insurance coverage and to continue building up pension and Social Security credits.

Displaced workers. Usually displaced workers, by definition, have recent work experience. They are not receiving Social Security benefits unless they are at least age 62, and probably are not getting pension benefits either. They typically need full-time work with full benefits in order to maintain health insurance coverage and continue building up pension and Social Security credits.

Displaced workers may identify strongly with their former jobs, particularly if they had held those jobs for many years. Alternatively, they may be ready for a change and perhaps may have waited out their employer's downsizing decision in order to get the "best deal" possible. Depending on the reason for their displacement, they will fall into one of two broad categories. If their skills have become technologically obsolete, they may be ready for reskilling and might consider a lower wage than they previously received. If they have been let go because of a merger or acquisition, their skills may remain relevant but only at another firm.

Early retirees. Such individuals, if younger than 62, are not receiving Social Security but are likely to be receiving pension benefits as part of an early retirement incentive package, which may also include health insurance coverage. Their work objective may be a full-time job, or it may be something part-time, temporary, or seasonal. Early retirees may be in a financial position to take on restricted hours–for a little additional income, to structure their lives, to maintain a sense of belonging, and to feel useful.

OLDER WORKERS

Retirees aged 62-69 receiving Social Security benefits. These individuals may have less incentive to work because they confront the Social Security retirement income test which can reduce their benefits. They often are interested in part-time work and flexible hours. Despite Medicare eligibility beginning at age 65, most are interested in group health insurance as a fringe benefit because of the diminishing share of health expenses covered by Medicare.

Retirees aged 70-plus receiving Social Security benefits. Typically, these individuals are interested in part-time work, flexible hours, and, often, the freedom to work from home. In addition to supplementing their retirement income, they may seek employment for its social and psychological benefits. Their Social Security benefits are not affected by employment income. As with their younger counterparts, many of these individuals also seek employer-based health insurance coverage.

POTENTIAL HIRING BARRIERS

There may be unique obstacles in recruiting and employing midcareer and older workers. Three are foremost: two of them are legal, the third is perceptual: (1) pension regulations may limit the number of hours an individual receiving a pension can work without losing benefits; (2) collective bargaining agreements can affect rehiring retirees or hiring individuals for part-time work; and (3) while not an obstacle per se, many people are under the misimpression that they may work only some maximum number of hours as opposed to earning a specific dollar amount if they are simultaneously receiving Social Security.

As part of a recruitment strategy aimed at workers from ages 62 to 69, employers should be prepared to help applicants figure out how working affects Social Security benefits. People who work after beginning to receive Social Security may lose some or all of their benefits if the income they receive from work exceeds a certain annual exempt amount. The exempt amounts are adjusted annually according to an index of average wage increases.

RECRUITING

Successful recruitment of midcareer workers requires top-down company commitment and support, including adequate funding and staff resources. To enhance communication and credibility with midcareer job seekers, assign staff members who can relate well to them whenever possible, to serve as spokespersons, recruiters, interviewers, and trainers.

Among the places to look for demographic and labor market information pertaining to midcareer and older workers are the county planning office and the mayor's office; the Chamber of Commerce, employment networks like Forty Plus, Operation ABLE, and Over 40 Counseling and Employment; state and U.S. employment service offices; and the local library for census data. Midcareer workers who fit with your corporate goals can be found in a wide array of organizations: fraternal, civic, social, and religious organizations; community colleges and universities; vocational, educational, and rehabilitation programs; adult education centers and technical training centers; and local volunteer networks.

In addition, polling your own work force can yield valuable information. Ask them how to make jobs and the work environment more appealing to midcareer workers, and what it would take to entice them to stay on the job or return to work after a sabbatical or retiring.

Look at your employment policies and practices. Do your firm's policies and practices regarding recruitment, hiring, evaluation, training, promotion, and termination reflect subtle or not-so-subtle forms of age discrimination or negative stereotyping? What are the attitudes of your supervisors and younger workers toward midcareer and older workers? Forming focus groups to address such questions and concerns might be one way to mesh your efforts to reach nontraditional workers with your initiatives in fostering diversity in the workplace. Age diversity should be part of any staff diversity training initiatives.

Marketing

As with workers of any age, midcareer workers respond to messages that emphasize opportunities for career development: a chance to use acquired skills in new and interesting ways, the availability of flexible scheduling, and competitive compensation including, most importantly, health insurance and the opportunity to participate in a retirement savings plan.

To help you find qualified workers with the experience you require and the interest in what your firm has to offer, try tapping into the following networks and programs:

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THE SENIOR EMPLOYMENT NETWORK

The senior employment network includes state, county, and local agencies, including the area agencies managing private employment services and federal government programs. Such agencies provide some or all of the following services to employers:

- A central job clearinghouse;
- Help in locating and communicating with the target group;
- Prescreening job applicants;
- Assistance in analyzing and restructuring jobs, benefits, and work environments;
- Information on experiences of other employers in recruiting and hiring midcareer workers; and
- Assistance in developing appropriate training programs or referrals to appropriate education and training facilities.

SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAMS (SCSEP)

The SCSEP is funded under Title V of the Older Americans Act. SCSEP is a work-training program designed to help economically disadvantaged persons aged 55 and older find jobs. SCSEP programs assess the skills and interests of participants in order to assist local employers in locating suitable, qualified workers.

SCSEP programs vary by location and sponsoring organization. They may be able to provide local demographic and labor market information and refer qualified midcareer job applicants who are eligible for their program.

To find a local SCSEP program, look in the telephone directory or check with your state office on aging.

WORK FORCE INVESTMENT ACT (WIA)

WIA was signed by the President on August 7, 1998. The WIA replaces the Job Training and Partnership Act (JTPA) and ties together more work force development programs through a mandated use of one-stop systems and governance by the state and local work force development boards. The law mandates a new coordination between the federal Departments of Labor and Education.

A summary of the WIA can be accessed at the web site of the U.S. Department of Labor, Employment and Training Administration: www.doleta.gov.

AMERICA'S JOB BANK

America's Job Bank is a partnership between the U.S. Department of Labor and the state-operated Employment Service. The job bank's computerized network links state Employment Service offices to provide employers rapid, national exposure for job openings and an easily accessible pool of candidates. In addition to on the Internet, the job openings and resumes found in America's Job Bank are available on computer systems in public libraries, colleges and universities, high schools, shopping malls, transition offices on military bases worldwide, and other places affording public access.

AMERICA'S TALENT BANK

America's Talent Bank is a nationwide electronic resume system. To market their qualifications, job seekers enter resumes into this national network, which can then be searched by employers for workers to fill their needs.

FORTY PLUS

Forty Plus and similar employment support groups help unemployed professional, supervisory, and management personnel aged 40 and older find jobs. Check the telephone directory to see if there is a local affiliate of Forty Plus or other specialized employment service, such as Operation ABLE or Over 40 Counseling and Employment.

NATIONAL CLEARINGHOUSE ON STATE AND LOCAL OLDER WORKER PROGRAMS (NCSLOWP)

The NCSLOWP provides consultation and training to businesses on recruiting, hiring, training, and retaining midcareer and older workers. The clearinghouse is operated by the National Association of State Units on Aging and provides information to businesses on how to link with state and local midcareer worker programs.

For more information on the services and publications of the clearinghouse, contact:

Director, National Clearinghouse on State and Local Older Worker Programs, NASUA, 1225 I Street, NW, Suite 725, Washington, DC 20005. Or call 202-898-2578

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chapter 3

MIDCAREER AND OLDER WORKERS

American firms increasingly are faced with unique challenges in maintaining workers' skills to meet both domestic and foreign competition. The terms "lifelong education" and "continuous reskilling" are not mere slogans; if anything, they understate the urgency and the magnitude of the task facing employers and workers at the dawn of the 21st century. When human resources are scarce, training becomes much more important.

Employers might wonder why they should invest in training people who may not stay very long. This issue applies equally to younger workers who might move on to jump-start or shift careers, to midcareer workers who decide to take a stab at self-employment or other nontraditional work arrangements, and to older workers who enter partial or full retirement. It is important to note that workers often move on precisely because other options offer greater opportunities for training or learning new things.

Salary is only one motivator; personal growth may be just as or even more important. A survey of more than 500,000 employees found that the biggest difference between employees who are committed to their organizations and plan to stay for five years, and those who plan to leave within a year, is the opportunity to learn new skills. (Employees in 300 companies were asked to rank 50 factors that influence their decision to move on. The other top factors: coaching and feedback from the boss, type of work, ability of top management, and recognition for a job well done. Money ranked much further down the list.)

Yet there are ways to keep workers motivated and productive other than relying on training. Workers of any age who are unlikely to rise much further in the organization, or who do not seek large responsibilities, may be able to remain productive and motivated with working across functional boundaries-cross-training, job-sharing, project teams, and the like.

Midcareer and older workers may have different training needs and adaptations from those of younger workers, even within the same field or the same firm. This fact can have both advantages and disadvantages. Advantages include a wider variety of past experiences from which to draw in devising ways to meet new challenges and in making transitions between methods of accomplishing tasks. Disadvantages include the possibility that such workers may be thought to believe they know the "one best way" to accomplish a task, or the best way to offer training to others, etc.

These plusses and minuses, however, are not unique to midcareer and older workers. In fact, the diversity in characteristics among workers in their forties, fifties, and sixties can be as great as that between young Generation Xers and older Baby Boomers. Employer expectations can in some cases influence the outcome of training programs. If workers of any age are treated as if a particular outcome is expected, then that outcome becomes all the more likely. This is an important phenomenon to keep in mind when making decisions about both hiring and training.

The most important, and the most difficult, training challenge for employers is identifying employees who need it most and motivating employees to take advantage of training programs. A training regimen ideally will incorporate ideas of maximizing the flexibility and capacity of employees to learn what the employer needs them to learn, and what employees need to know to do their jobs.

CAREER BURNOUT

Burnout means, simply, emotional and often physical exhaustion. Its signs include excessive absenteeism, complaints about work overload, uncharacteristic disregard for work quality, and other behaviors that mark a departure from what has been customary. At its worst, it can mean physical disability in the form of back problems, ulcers, migraines, and substance abuse.

When burnout occurs, or is suspected, managers can take steps to prevent it from derailing careers and wasting talents in which the employer has already made some substantial investment. Employers increasingly are becoming the agents of intervention in some form of employee assistance programs. Possible interventions include job redesign or job rotation; special temporary assignments; reassignment as mentors or trainers of new employees; stress management training; and, for workers of long standing, sabbatical leaves.

CAREER PLATEAUING

Career plateauing is understood to occur when an individual's rate of what might be called "job growth," typically measured in terms of promotions, ever more highly visible assignments, or pay increases, levels off and perhaps even moves slightly backward for a time. As noted above, this may be less a reflection on an individual's productivity than it is a sign that employer appreciation, such as pay hikes, is harder to grant than once was the case.

Nonetheless, career plateauing becomes increasingly likely with age. After all, individuals who have invested considerable time and energy in their employment in a particular occupation or industry are naturally more likely to experience a career "stall" than are younger workers whose background, exposure, and effort are more limited. Plauteauing, per se, may not even be a problem at all. However, its frequent companion—simply giving up and no longer really trying—needs to be addressed both by the individual worker and, where desirable and appropriate, by corporate management.

SOLUTIONS

There are several possible solutions to career plateauing.

Performance appraisals. A first line of attack–and certainly the least expensive overall–is to use performance appraisals to alert employees to problems on the job. Frequently, the worker may be in denial about the existence of a problem, or, if aware that a problem exists, may hope that the reality has not been noticed by management. Most employers have such an appraisal system in place, either formally or informally.

However, many employers do not make effective use of performance evaluations unless and until a performance problem has reached possibly insurmountable proportions. By then, the below-par performance may be so thoroughly entrenched, or the individual may be so well protected by a lack of official managerial admonition, that remedies are messy, costly, and apt to be characterized more by recriminations than by constructive remedial conduct on both sides.

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Special projects. While it may not be feasible or cost-effective to undertake a thoroughgoing job redesign, assigning employees for a limited time to projects that use their unique skills can be an effective plateau-buster. Employees who are aware that such options are possible are less likely to demonstrate the signs of career plateauing. Employers that are open to using employees on special projects on a regular basis may even find that employees themselves devise some of the most creative and inexpensive ways to "detour" their jobs in ways that maximize their value to the firm.

Alternative/multiple career paths. Encourage workers to develop a plan for career progress. Have them look at new roles, seek out challenging new assignments, or consider lateral moves. Moving sideways rather than upward can bring about new and exciting opportunities and provide a chance to learn new skills.

Opportunities for training and development. Make sure that employees are aware of all training opportunities your company provides, and that all employees have equal access to training. Encourage employees to take responsibility for lifelong learning. Consider coaching employees to assess their training needs to ensure their skills align with the company's strategic direction.

Job-posting/bidding systems. Make sure all employees are aware of and have access to job postings so that everyone has a fair chance to compete for openings.

CAREER OBSOLESCENCE

Career obsolescence occurs when the skills and knowledge needed to do a job have become outdated. In extreme cases, a job simply ceases to exist owing to a breakthrough technological innovation. Horseshoers and buggy-makers disappeared with breathtaking speed with the advent of the automobile; in more recent times, telephone operators have become all but extinct.

A certain amount of obsolescence is unavoidable, indeed essential to dynamic growth, but to the individuals affected it can be traumatic and demoralizing. And it can affect even the most energetic and productive workers. Fortunately, most obsolescence is gradual and manageable.

SOLUTIONS

Some possible solutions, or deterrents, to career obsolescence include the following:

Retraining programs. Offer ongoing retraining programs that sharpen existing skills or teach new ones. Employees who have practice in continuously undertaking training and learning new ways of doing things can be redirected with surprising ease. It is only when training is sporadic and associated with major employment dislocations that it is less likely to "take."

Professional organizations. Encourage employees to become active in professional organizations, through paid time off to attend functions, or through subsidies of membership dues. While an employer may not find it immediately profitable to incur expenses that have only a marginal connection with the work at hand, such practices can prove surprisingly effective, often in unanticipated ways. For example, employees who network outside the immediate office environment may be better equipped to funnel contracts the employer's way.

Additionally, well-connected employees can be a valuable resource when a sudden need arises for a particular kind of talent not found within the firm. Finally, employees who are encouraged to "stretch" professionally tend to be more loyal to the firm that makes it possible; there are no guarantees, of course, but goodwill can be extremely valuable. Even employers that do not incur a budgetary cost in encouraging professional affiliation by their employees can anticipate some modest gains from taking an open, flexible approach to networking.

Training courses. Encourage employees to enroll in courses to keep up with new developments, or branch out into a different field. Like the practice of encouraging professional organizational memberships, this can come in a variety of flavors. Some decisions may be influenced by tax laws that provide incentives for certain types of instruction. While it may be hard to quantify the benefits of promoting employee course work, there is no question that workers who flex their brains to acquire new types of knowledge are better able to handle whatever new requirements might arise on the job.

Career planning. Establish or upgrade a career planning and management system. Many larger employers already have a formal system in place. Career planning workshops can be offered on a recurring schedule, or a permanent career

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information center established. Smaller employers might have an ad hoc system that kicks in at times of significant culture change. Again, it is up to individual workers, not their bosses, to manage their careers, but the ability to acquire inexpensive or free on-site career guidance can make a difference in how workers view their employers, their careers, and the prospects of corporate change. Various software programs are available at reasonable cost to employers interested in offering such assistance to their employees.

Career reevaluation. Encourage workers to reevaluate their career options on a regular basis, and urge them to develop career contingency plans. If issued only sporadically, such announcements could cause the rumor mill to spin out of control and threaten productivity. However, if such messages become a core part of the firm's culture-stressing that nobody's job is guaranteed, even if job performance is not in question-then it can help in maintaining ongoing realism about the labor market and even promote a healthy spirit of can-do confidence. The key is to introduce this message at a time when "business is booming" and not when conditions might appear uncertain.

Career Management

Effective career management is the first line of defense against the ills described above–career burnout, plateauing, and obsolescence. Unfortunately, until fairly recently, managers have tended to assign it to a rather low priority. The experience of the eighties and nineties, however, has brought the importance of this issue to the fore. Employers that have undertaken one or more restructurings involving staff downsizing have learned that such actions can have unanticipated costs. When buyouts and other inducements are offered, it is often the most job-ready and mobile workers, including some older workers who can begin drawing pensions, who take the offer and leave. Such workers often take valuable institutional memory along with them, and they sometimes have to be rehired as consultants while they simultaneously draw "retirement" benefits.

Answers to the following questions can help you decide whether you need to give greater consideration to career planning and management:

1. What organizational changes are likely to affect the way my unit, department, or organization will operate in the next couple of years?
2. Which employees would benefit most from training and development to stay productive, or to boost productivity?
3. What are the career aspirations and personal development ambitions of the employees in my department? Are any patterns evident?
4. Are employees' career goals realistic in light of the organization's plans?
5. How can we help employees mesh their career aspirations with the company's long-term goals?

A growing number of employers recognize that company-wide career management pays dividends in employee commitment and productivity. Many employers are experimenting with multiple career paths, on-the-job development opportunities, career planning workshops, individual career counseling, and mentor-protégé relationships.

Determining Your Training Needs

A thorough needs assessment must precede the implementation of an effective training and development program. Here are a number of common and complementary approaches to identifying training needs.

IDENTIFICATION

Organizational analysis focuses on company strategy. By examining sales forecasts and expected changes in production, distribution, and support systems, employers can determine which skills are likely to be needed and in what quantities. Comparisons with current skills levels and capacities yield estimates of staff and training requirements.

Research suggests that managers and workers often do not perceive things the same way. This applies in the realm of training, too. Not only can you offer your workers the kinds of training your firm needs, but you should ensure you have their buy-in in the training decision. Two complementary aspects are important. First, *task analysis,* which requires identifying the elements of current or future tasks to be accomplished and developing (or purchasing off-the-shelf from an outside vendor) a training program accordingly. Second, *personal needs analysis,* a newer technique, that involves using interviews or employee survey questionnaires to gain worker perspective.

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Task analysis used to suffice; in today's labor market, increasingly, it needs to be augmented with an assessment of employees' perception of what training would be helpful in making them as productive as possible. Of course, this assumes that management is prepared to listen and, to the extent feasible, act on what workers have to say. If this is not the case (and management should delve deeply into this; sometimes wishful thinking can result in misleading workers), it is far better not to engage in the survey/interview process. Not only do surveys and questionnaires have potentially significant financial costs, but, improperly handled, indirect costs can be much greater. People are often quick to conclude that the process is mere window-dressing. If this happens, then subsequent efforts probably will not succeed either.

MOTIVATION

When offered a training opportunity, midcareer and older employees may ask themselves:

- Is this training worth the time and trouble it will take?
- Can I master the new skills without embarrassing myself?
- How will I compare with others in the class? (For midcareer workers, the question might be more pointed: Will I be the oldest person in the class?)
- If I successfully complete the training, how will I be rewarded? Will I be eligible for a promotion or a new position in the firm?
- If I fail to undertake the training, or do poorly at it, will I (or my job) be at heightened risk of termination/elimination?

Employers can help to overcome workers' insecurities by:

- Explaining why the training is necessary or highly desirable,
- Linking training to valued rewards, and
- Helping trainees extend their sense of self-responsibility for their own training needs.

The objective is to create a win-win situation, in which employers and employees agree that training or retraining pays off for both of them.

BUILDING SELF-CONFIDENCE

Even when employees realize they need to learn new skills, they sometimes feel insecure about their ability to learn. It may have been a long time since they have been in a classroom, and they may fear that their learning abilities are rusty. This is especially likely to happen when training focuses on skills that require learning complex patterns of eye-hand coordination, such as computer-assisted operations.

Research suggests that midcareer workers are more afraid of failure when they are in competition with younger, more recently educated trainees. To address this, managers should focus on building trainees' self-confidence. It is important to understand that:

- Older learners see themselves as autonomous, self-directing, self-responsible.
- Older learners have unique experiences that greatly influence their attitudes, interests, needs, and desires. Trainers can increase their confidence by allowing and encouraging older trainees to use their skills in new learning contexts, because new ideas and experiences can be vested with greater meaning when they are used to relate to and build on current experience.
- Active participation in the learning process allows the older trainee to share in the responsibility for the success of the learning experience.
- Training and rewards go hand in hand. If trainees work hard to master a new skill, they should be rewarded or know that rewards are in the offing. If high-performance training is not followed by meaningful rewards, trainees are likely to become resentful and alienated.

SETTING GOALS AND OBJECTIVES

By asking questions, the trainer can help workers determine their training goals and objectives without being overly directive-particularly desirable when dealing with experienced workers. Good questions can help trainees think through a problem. Examples of useful questioning approaches are:

1. What is your goal for learning the new computer system?
2. What problem(s) will you work on first? When do you plan to complete it?
3. How will you know when you are ready to take on the new accounts?

4. Are there some benchmarks you can use to check your progress?
5. How will you reward yourself when you finish the course?

ADAPTING TRAINING TECHNIQUES

Here are some useful questions to ask in building your training plan and curriculum.

Do you...

1. Have the trainees assist in planning the curriculum?
2. Work with each trainee to develop an evaluation process that will measure the extent to which his or her personal learning objectives have been accomplished?
3. Allow for participation and interaction among learners by using problem-solving, case studies, role-playing, and practice sessions?
4. Relate new learning to trainees' past experiences?
5. Help each trainee transfer and translate current skills to the new skills being learned?
6. Provide handouts to accommodate the learning style of trainees who depend less on what is seen or heard "at the moment" than on what they are able to review later, upon private reflection?
7. Use large, bold, dark print on flipcharts, and minimize glare?
8. Dim the lights only slightly during films, videos, and slides. (Lighting that is too dim is harder on the eyes, and makes notetaking difficult.)
9. Wherever possible, post training materials at eye level?
10. Try to reduce or eliminate background noise?
11. Use good diction and speak clearly at a natural rate of speech and in a deeper vocal range than you might use in ordinary conversation?
12. Offer accommodations for the hearing-impaired, for example, seats at the front of the room or a sign language interpreter?
13. Minimize, where possible, the perception of time pressure and encourage self-pacing and practice?
14. Where an audience is composed primarily of midcareer workers, try to use a trainer who is close to their age whenever possible?
15. Provide frequent reinforcement, encouragement, assurances?
16. Repeat new and complex concepts several times?
17. Always stress the relevance and application of training issues to "real-life" situations?

Remember, if the learner hasn't learned, it's usually **because the teacher hasn't taught!**

Mastery of new skills is only the beginning. The real payoff from training and development comes when employees apply their newly acquired skills on the job. Having the trust and support of one's supervisor is critical to the transfer process.

Supervisors...

1. Have to provide opportunities for employees to practice and apply their new skills in challenging assignments or new kinds of tasks. Without continuous practice, new skills could quickly fade.

2. Must be supportive of employees who are willing to take some risk in applying their new skills on the job. When supervisors and coworkers demonstrate confidence in an employee's ability to master a new task, the positive expectations of success are often contagious.

3. Should treat mistakes as learning experiences. When problems are viewed as temporary relapses, they hasten recovery and encourage continuous improvement.

Creating a positive work environment, where employees of all ages are encouraged to use and refine their newly acquired skills should greatly enhance the return on training investment.

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chapter 4

motivating MIDCAREER AND OLDER WORKERS

In the face of growing numbers of poorly educated, unskilled, and undermotivated workers, business can call upon the experience, stability, good judgment, and maturity of midcareer and older workers to fill important organizational positions. Research shows that such workers often have farsighted views of their work and highly responsible attitudes toward it. When positively motivated, they are able to extrapolate from their experience to develop creative solutions to today's problems.

Most midcareer workers continue to work hard and perform well. Those who do not often perceive that their opportunities for promotion and increased earnings are limited. If this is the case, management needs to find ways to motivate the employee.

Principle 1: Use Needs as Motivators

To motivate workers, managers must first understand their needs. These may include everything from the pursuit of basic necessities, to social needs involving establishing meaningful relationships with others, or needs for self-realization by working to full potential.

Research has shown that certain needs tend to be especially important to midcareer and older workers. An obvious one is financial security. Particularly if nearing so-called "retirement age," these workers may fear that they will not have enough money after retirement for necessities, and that they may have to reduce their standard of living.

Surveys show that many midcareer and older workers are concerned about social needs as well. Like younger workers, they want friendly co-workers and supervisors, and they have a strong need to make real contributions to the workplace. Balancing work and home life is important to workers of all ages. Midcareer workers may be faced with caregiving responsibilities for both children and parents, creating stresses that can interfere with productivity unless employers provide supportive policies.

Principle 2: Link Satisfying Needs to Behavior

Merely satisfying the needs of workers will not motivate them to do their jobs. While satisfied employees are more likely to have high morale and to speak favorably about the organization, they are not necessarily more productive.

For satisfying needs to lead to improved job performance, it must be linked to job performance. There are two ways to do this. One is through goal-setting, and the other is through reinforcement.

Principle 3: Set Specific, Challenging, Yet Attainable Goals

Research shows that people do better when they are working toward specific, challenging, reachable goals. Among the benefits of goal-setting are raised productivity, improved work quality, reduced boredom, increased work satisfaction, spontaneous competition among employees to succeed, enhanced self-confidence and pride in performance, and an increased willingness to accept future challenges.

Participation by employees in goal-setting can lead to a better understanding of the job to be done and how best to do it. Such participation also demonstrates respect for workers' ideas and gives them the chance to confirm their understanding and acceptance of the goals.

When a goal has been set and internalized by the employee, a potential for stress has also been created. If reaching the goal is very important to the employee, but achievement of that goal is blocked or begins to appear unlikely, stress is the natural result. This can be especially true when the employee has multiple goals and there is no one way to meet all of them.

Other potential difficulties arising from goal-setting are recklessness and excessive risk-taking by the employee; regarding goals as ceilings and coasting when the goal is almost reached; ignoring critical parts of a job that are not specifically goal-focused (such as day-to-day record-keeping); losing sight of long-range goals for the sake of reaching shorter-range goals; and cutting corners or even resorting to dishonesty to measure up. In spite of these potential difficulties, goal-setting has proven effective as a motivational approach. Without goal-setting, employee performance lacks direction.

Principle 4: Provide the Means to Achieve Goals

Management should provide nontraditional and midcareer workers the same degree of assistance that is provided to all other employees. In some organizations, there is a tendency to pay closer attention to the needs of new employees while neglecting the long-time staff. Sometimes managers are reluctant to train people they believe may soon be leaving, either for other work or for retirement. The solution is to discuss any needed assistance, including training, when goals are set and accepted.

Principle 5: Reward Achievement

Implicit in the goal-setting process is a promise that meeting goals will be rewarded in some way. Beyond the obvious rewards of money and recognition, people also respond to rewards that address their need for feelings of competence and social interaction.

Money. In modern society, money satisfies a wide variety of individual needs, beyond the ability to purchase basic necessities. Money conveys status, prestige, and a sense of one having accomplished something worthwhile. If superior job performance is to be rewarded through incentive pay increases or merit raises, this needs to be clear. If there is no formal system in place, employees need to know how their efforts will be noticed, evaluated, and compensated.

Recognition. Public acknowledgment of a job well done can be a significant reward even without additional monetary compensation, particularly for one-time projects or unusual team efforts. Nontraditional and midcareer workers who may not be as thoroughly integrated in an establishment's culture can find this form of reward especially meaningful.

Skill acquisition and competence. People generally have a need to achieve up to the level they are capable of. If provided the opportunity, they will keep score of their performance, rewarding themselves for a job well done. Opportunities for such self-administered performance monitoring and feedback should be built into the goal-setting process. For instance, Emery Air Freight encour-

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aged its employees to keep track of their own productivity, with additional recognition and encouragement from their supervisors. The results in improved performance were impressive.

Social interaction. Because employees often have strong social needs, management should be on the lookout for ways to provide social opportunities to employees, such as participation in conferences or special opportunities to interact with customers and clients, as a reward for good job performance.

Principle 6: Maintain Motivation

For most people, almost any job that is repeated too often becomes boring. There may be ways to add new elements to a job to make it more stimulating. For example, rather than having an employee do only one small piece of a large job, expand the assignment to doing the complete job from start to finish. This varies the job, uses a wide variety of skills, and gives the employee a feeling of enhanced accomplishment.

While this is not necessarily "productive" in the assembly-line definition of productivity, it can allow employees to understand job components they do not ordinarily deal with, and can lead to innovative suggestions and solutions that the everyday practitioners of the task would not necessarily devise.

The concept of quality circles in manufacturing relies on a kind of thinking as applied to teams. Employees' sense of responsibility is increased by granting them greater autonomy over their work–from hours of work, to who does what, to (in the most extreme cases) the design of the ultimate product. Clear and timely feedback reinforces the process, so long as only good performance is rewarded and poor work is not condoned.

Often, it is difficult to assess whether an employee's unsatisfactory job performance is caused by a lack of skill, a lack of will, or some combination (they can be mutually, and highly negatively, reinforcing). With skills upgrading a necessity in the majority of jobs in the information age, this is a vital employer, and employee, concern.

It is also important to recognize that motivation methods that once may have worked effectively can cease to be serviceable. The novelty of new approaches eventually wears off, decreasing job performance. Further, employees have powerful, built-in "baloney detectors," and if it becomes clear that managers and supervisors are parroting a company line without anything ever really changing, morale and productivity inevitably suffer.

When job changes become necessary to accommodate changing circumstances or business practices, midcareer and older workers need to be given the same access to training and support, and enough time to adjust. They can be valuable as members of new teams, serving as mentors and coaches where less experienced workers are probably less well-equipped to provide insights and guidance.

Creating Alternative Work Arrangements

The human resource management policies of many organizations force more senior workers to choose between full-time employment or total retirement. However, many midcareer and older workers prefer more flexible working arrangements as they near the end of their careers. Phased retirement is a strong preference of many. A gradual scaling back of work responsibilities allows individuals to continue to earn some income and be productive while allowing for an increase in leisure pursuits and time devoted to family. Post-retirement options to work on a consultancy basis or to fill in during peak work periods also appeals to many workers.

Other alternatives to full retirement include part-time or temporary assignments, job-sharing, and "bridge jobs," which can be special "emeritus" kinds of positions that help keep and reward especially valued employees. Increasingly, of course, workers of all ages are demanding a better balance between their working lives and family time, so that increasingly there will be no need for employers to craft any special work schedules or assignment adaptations for midcareer and older workers. Recent surveys of employers indicate that flexible work schedules are among their most effective worker retention tools.

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Conclusion

Many employers have found that midcareer and older workers are a valuable resource. These employers have learned that it is ability, not age, that counts on the job. Employers who are recruiting and retaining these workers have discovered a vast resource of talent and experience...and also growing competition for midcareer and older workers. They are successfully using the experience of a lifetime.

About AARP

AARP, celebrating 40 years of service to Americans of all ages, is the nation's leading organization for people age 50 and older. It serves their needs and interests through information and education, advocacy, and community services provided by a network of local chapters and experienced volunteers throughout the country. The organization also offers members a wide range of special benefits and services, including *Modern Maturity* magazine and the monthly *Bulletin*.

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AARP seeks to increase opportunities for our members and other midlife and older Americans to build their economic security–both now and in retirement–through paid employment; pensions, savings, and investments; and responsible money management.

AARP publishes *Working Age*, the nation's first newsletter developed specifically to assist human resource managers to hire, manage, and promote the aging work force. This bimonthly is available without charge to employers, managers, and decision makers. In addition, AARP offers research and publications that help employers, employees, and policymakers succeed in today's changing workplace.

For more information, write to: AARP, Economic Security/Work Issues, 601 E Street, NW, Washington, DC 20049 or call (202) 434-2100.

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